

RIGHT
NOW[®]



A stylized blue logo consisting of a wide, shallow triangle with a pointed top, resembling a mountain range.
S U M M I T 0 9

**CO-BROWSE FOR AN IMPROVED
CUSTOMER EXPERIENCE**



Introductions

- ▶ Anna Emmert
 - RightNow Product Manager Service
- ▶ Sandy Erickson
 - RightNow Director of Application Product Management
- ▶ Boyd Beasley
 - Electronic Arts Senior Director of WW Customer Support
- ▶ Enzo Bacelo
 - LiveLOOK Director of Sales & Marketing
- ▶ Linda Ziemba
 - LiveLOOK VP of Sales & Marketing

Agenda

- ▶ Co-Browse and the Web Experience
- ▶ Key Co-Browse Trends
- ▶ Improving Key Metrics
- ▶ Co-Browsing Best Practices
- ▶ Customer Case Study
- ▶ Summary
- ▶ Q&A

RightNow CX

RightNow Web Experience

Applications that seamlessly integrate into your existing web infrastructure for a fully branded online customer experience

RightNow Social Experience

Applications that integrate social media into your organization to promote your brand, address customer concerns and fuel innovation

RightNow Contact Center Experience

Applications designed to deliver superior customer experiences and efficiencies across phone and multi-channel interactions


RightNow Engage

Applications that provide deep customer insights and enable proactive, relevant customer communications that build loyalty and drive revenue

RightNow CX Platform

Foundational elements that infuse knowledge across the entire suite and provide integration and mission critical services that support superior customer experiences


RightNow CX

 RightNow Web Experience

- Web Self-Service
- Chat and Co-Browse
- Email Management
- Web Experience Design

 RightNow Social Experience

- Support Communities
- Innovation Communities
- Cloud Monitoring
- Social Experience Design

 RightNow Contact Center Experience

- Phone and Multi-Channel Interaction Management
- Case Management
- Voice Automation
- Contact Center Experience Design
 - Desktop Workflow
 - Agent Scripting
 - Contextual Workspaces

RightNow Engage

Marketing Feedback Sales Analytics

RightNow CX Platform

Knowledge Management

Integration

Mission Critical SaaS

Key Co-Browse Trends

RIGHT
NOW.



 **SUMMIT 09**



Key Co-Browse Trends

- ▶ Offering multi-channel choice is imperative for a great customer experience
 - Present customers with a choice of interaction experiences
- ▶ Provide a seamless way to escalate to an assisted web experience
 - Smart businesses deploy web self-service, live chat, and phone support, but that may not be enough



Key Co-Browse Trends

- ▶ Growing need for a more personal, assisted web experience in the high volume contact center
 - Must increase agent productivity while also enhancing customer experience
- ▶ A visual connection between the agent and consumer can help assist in the web experience, as long as:
 - There is nothing to download or install
 - There are no technical issues with firewalls or pop-up blockers
 - Technology works with any browser on any computer (Windows, Mac, and Linux)
 - Renders any consumer page - regardless of complexity

Key Co-Browse Trends

- ▶ Customers must feel they are in control and are safe in their assisted web experiences
 - It must be the consumer's decision whether to grant the agent access to their desktop
- ▶ It is important that the following security requirements are met by the co-browse solution:
 - Lives in the browser and does not touch the hard disk
 - Does not violate security protocols, trigger pop-up blockers, or invoke security alerts
 - Uses session keys randomly generated for each interaction
 - Image deltas are transmitted using HTTPS
 - Uses ports 80 and 43 - we do not touch firewalls



Improving Key Contact Center Metrics

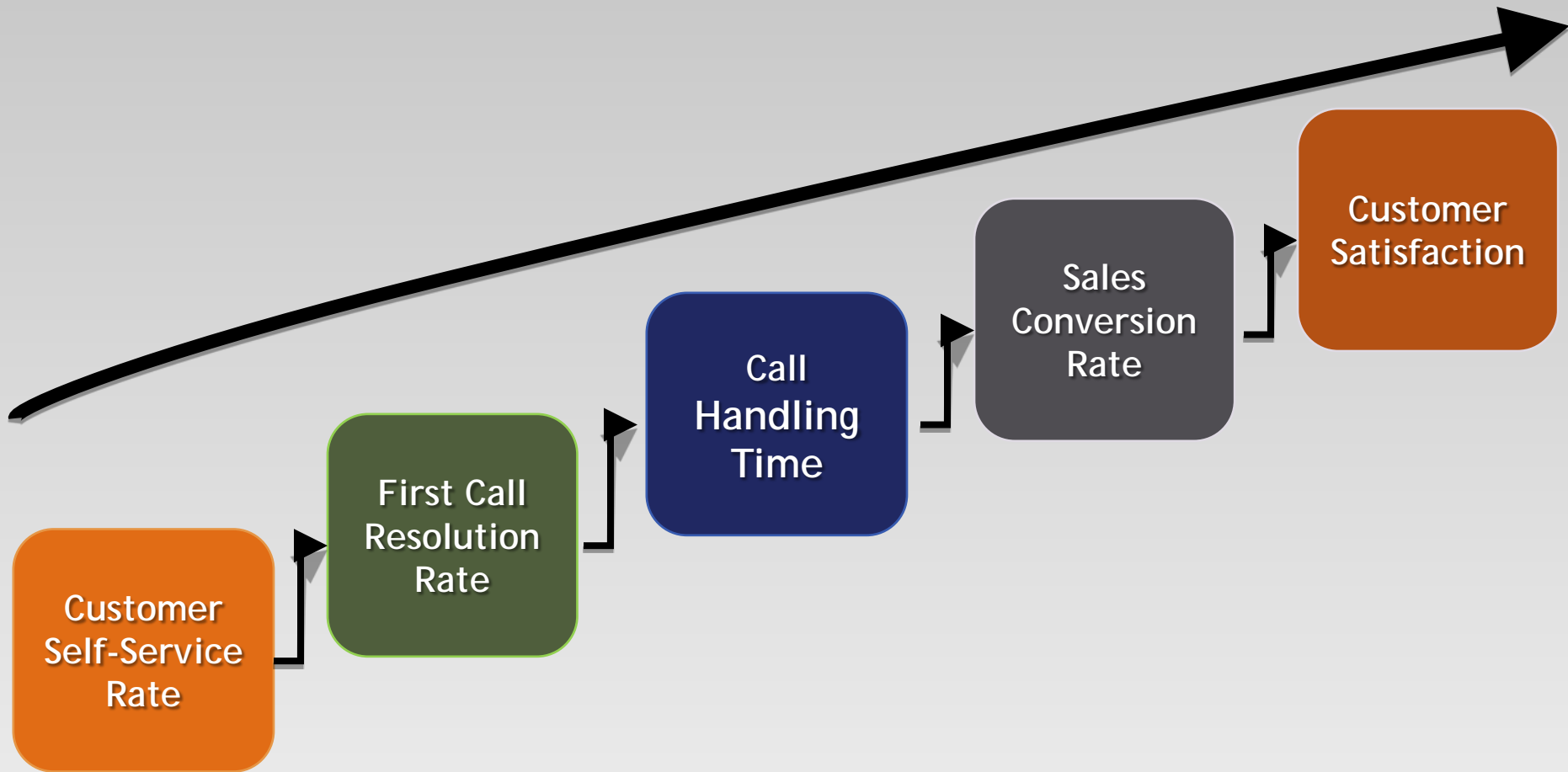
**RIGHT
NOW.**

.....

SUMMIT 09

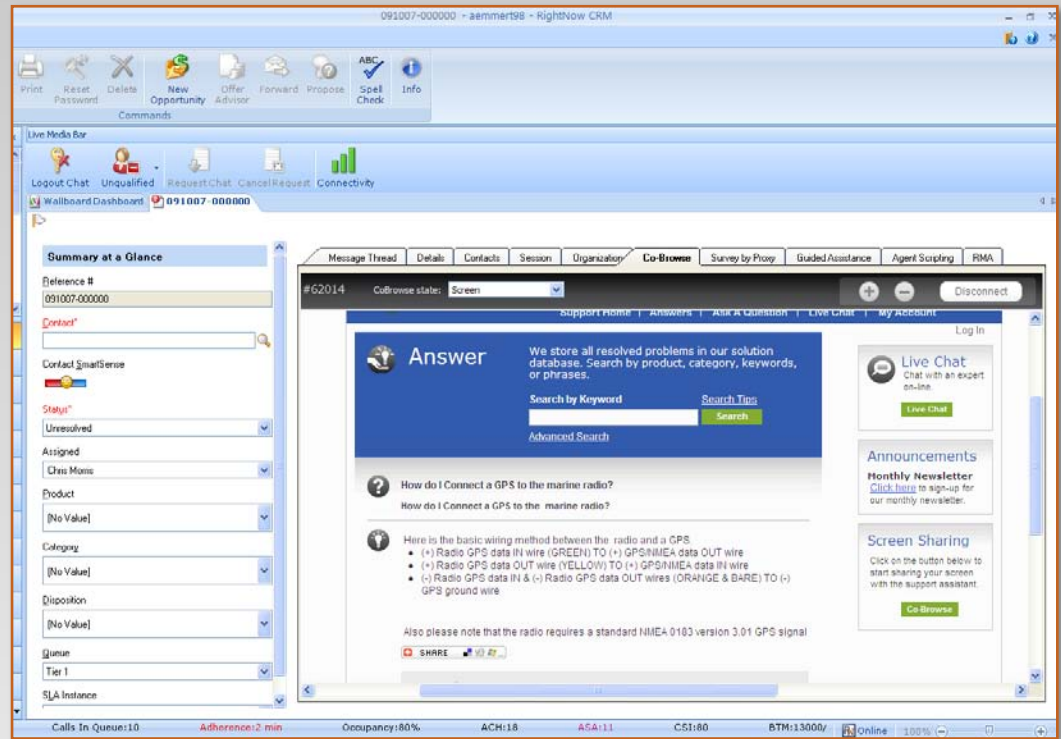


Key Metrics to Measure Success



Improve Customer Self-Service Rate

- ▶ Use co-browse to guide a consumer through your knowledge base to the appropriate answer
- ▶ Teach the consumer how to search and navigate the knowledge base
- ▶ The customer will be enabled to self-service the next time a question arises



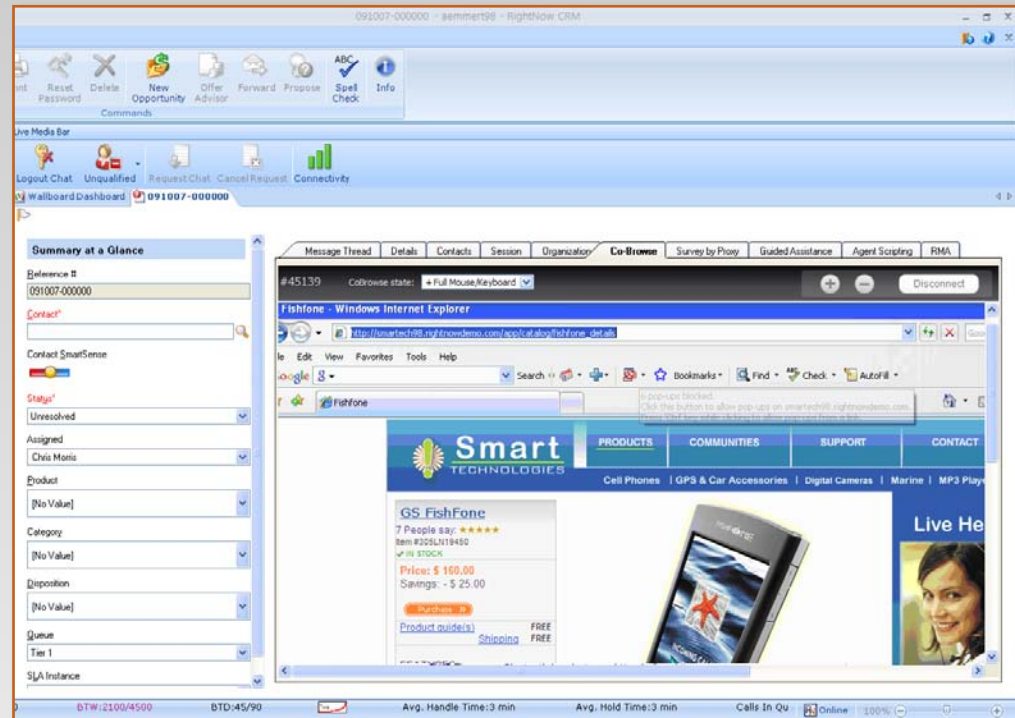
Improve First Call Resolution Rate

- ▶ Complete partial form-fills and lengthy application processes
- ▶ Navigate your site with a confused customer
- ▶ Guide consumers to web content that is available to them to resolve their issue
- ▶ Co-edit documents in real time

The screenshot displays a CRM interface for a customer with reference ID 091007-000000. The main window shows a 'HEALTH INSURANCE 2008 ENROLLMENT FORM (Please Print)'. The form includes fields for SSN, EID, Name, Agency Name, Mailing Address, Work Phone, Home Phone, Sex, Birth Date, Home County, and Work County. It also features a 'PART 1: STATE HEALTH INSURANCE - Please check (✓) your choice.' section with options: WAIVE my Health Insurance, ENROLL me in Health Insurance, CHANGE my Health Insurance, and CANCEL my Health Insurance. The interface includes a 'Summary at a Glance' sidebar with filters for Status (Unresolved), Assigned (Chris Morris), Product, Category, Disposition, Queue (Tier 1), and SLA Instance. The top navigation bar includes options like Print, Reset Password, Delete, New Opportunity, Offer Advisor, Forward, Propose, Spell Check, and Info.

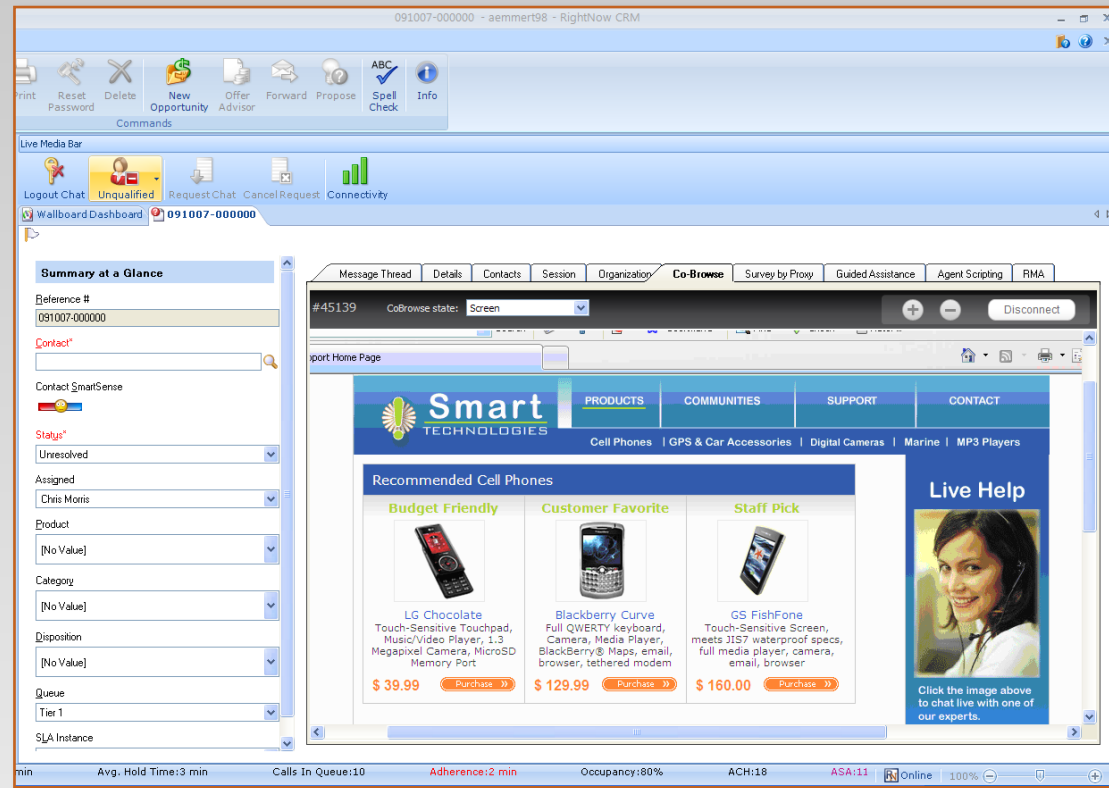
Reduce Call Handling Time

- ▶ Augmenting phone calls with a co-browse sessions makes for shorter & more effective interactions
 - Typically takes 4 minutes for an agent to identify exactly where a customer is on a website
 - The ability to “be on the same page” reduces frustration
 - Help the consumer navigate to a page on your website



Improve Sales Conversion Rate

- ▶ Visually engaged web visitors stay on your site longer
- ▶ Drive revenue at eCommerce sites (standalone or escalated from chat)
 - Co-shop, cross-sell/up-sell
 - Assist in shopping carts rescue proactively through chat
 - Point & guide your customer to the close



Co-Browse Best Practices

**RIGHT
NOW.**

.....

SUMMIT 09



Know When to Use Co-Browse

- ▶ Train agents on when to augment an interaction
 - Customer interactions where you visually point and direct consumers to web-based information
 - Potential good fit scenarios:
 - Filling out complex webforms or applications
 - Helping customers find and understand web-based support information for complex products/services
 - Referring customers to complex web URLs
 - Explanation of new online product or self-service capabilities
 - Balancing act - think about the key metrics
 - Will a visual presentation of the consumer's web experience help agents reduce call handling time, first call resolution rates, or increase customer satisfaction?

Implementation Best Practices

- ▶ Don't force it - recommend when a screen sharing session would be beneficial but be prepared to assist using existing channel
 - In the contact center, speed to resolution is key
- ▶ Notify the customer if you intend to share control of the mouse and keyboard
- ▶ Communicate with your customer throughout the interaction
- ▶ Move deliberately if you take control - teach the consumer how to do what you are doing
 - Allow the customer to enter their own payment information
- ▶ End co-browse session prior to end of interaction
- ▶ Listen to your customers
 - Ask for feedback after the interaction
 - Use the feedback gathered to compare customer satisfaction with interactions including co-browse session vs. traditional phone/chat transaction

Summary

**RIGHT
NOW.**




SUMMIT 09



Primary Co-Browse Benefits

- ▶ Provides greater channel choice
- ▶ Increased agent effectiveness and productivity in complex web-based sales and service scenarios
- ▶ Fewer miscommunications during the interaction
- ▶ Improved first contact resolution rates/faster resolution in assisted self-service scenarios
- ▶ Increased conversion rates/higher shopping cart value in assisted shopping scenarios
- ▶ Provides a superior customer experience

“Customers often abandon their online efforts when confronted with a complicated task. But firms can deter this... by **deploying chat** to provide access to agents who can reason, diagnose problems, analyze information, and make recommendations.”

Forrester, *Improving the Design of Chat Interaction*, March 2008

What makes RightNow Co-Browse Unique?

- ▶ Purpose-built for the contact center:
 - Launches quickly and easily for agents
 - Simple agent interface for ease and speed of use
 - Nothing to download or install for the consumer
 - Universal - works on any computer system
 - Renders any consumer page - regardless of complexity
 - Simple to implement
- ▶ Integrated with the RightNow Desktop for ease of use and seamless experiences

Additional Resources

- ▶ Ask the Experts
- ▶ RightNow Community - www.rightnow.com
 - Support
 - Discussion Forums
 - IdeaLab
 - Library
- ▶ Your Account Manager
- ▶ Email aemmert@rightnow.com

RIGHT
NOW[®]




S U M M I T 0 9

THANK YOU!

